



SSIS Fiscal

Fiscal Navigation

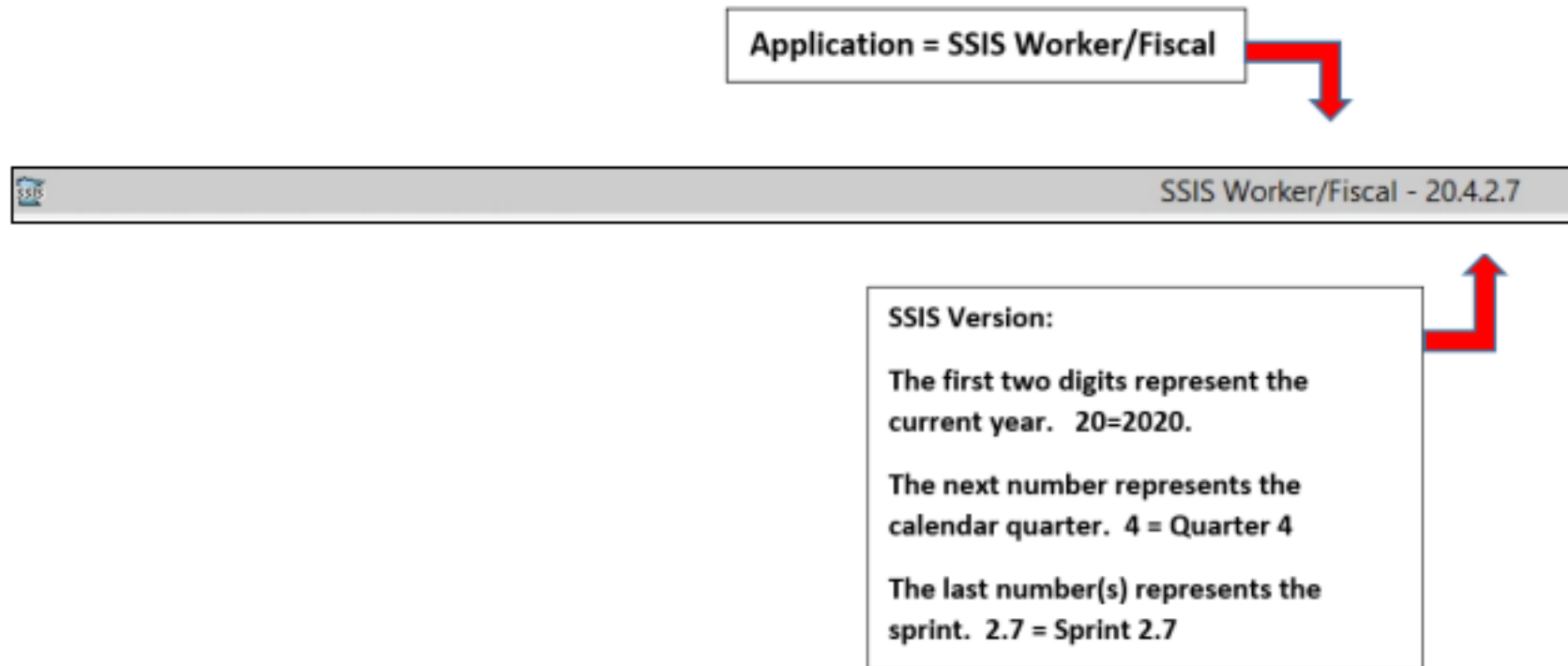
May 2023

SSIS General Navigation

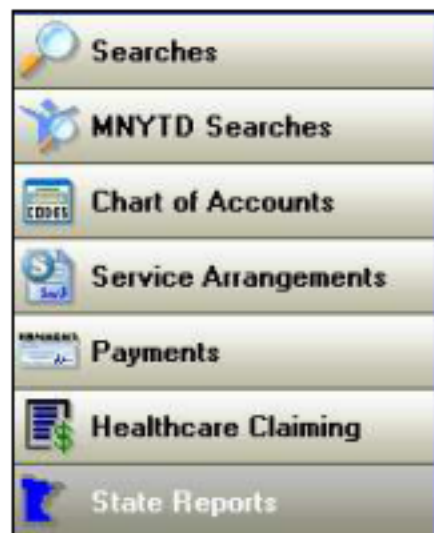
This portion of the SSIS General Overview focuses on general navigation and toolbars in SSIS.

Application Title Bar

The Application Title Bar appears at the top of the screen and displays the name of the SSIS application that is open as well as the current SSIS version being used.



The Task Panel



The Task Panel contains the functions most used by fiscal workers.

The Task Panel displays on the left-hand side of the SSIS Fiscal/Worker application. It categorizes tasks and provides quick access to those used most often.

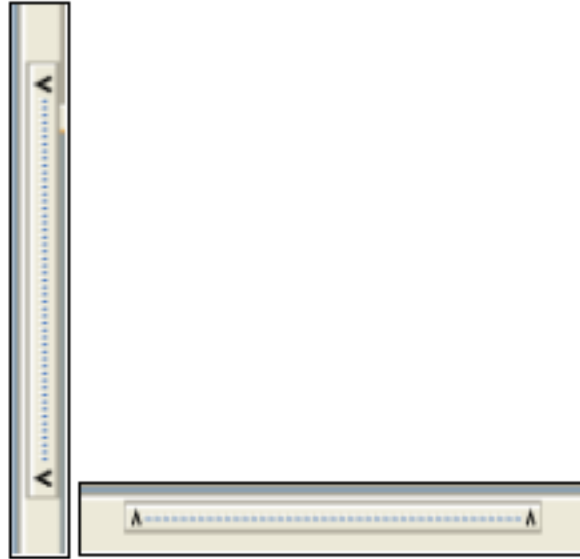
The Task Panel may be hidden or viewed by:

- Selecting or deselecting Task Panel on the View menu
- Using the Splitter Bar to expand or collapse the Task Panel

Users must have the XP Option function assigned to their role to view the Task Panel.

When a category is clicked on, the Task Panel expands displaying different tasks related to that category.

Splitter Bars



Splitter bars divide the screen into 5 different sections.

- Task Panel
- Tree View/Data Clean-up
- Search Panel
- Preview Panel
- Detail Panel

Click and drag the bar to expand the view or hide information not needed on the screen.

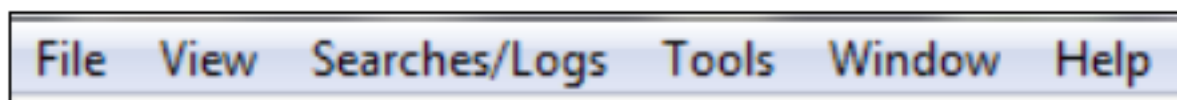
Clicking on the line between the arrows expands or collapses the panel completely in the direction the arrows are pointing.

Toolbars

There are three toolbars in SSIS:

- Windows toolbar
- SSIS Application toolbar
- Tree View toolbar

Windows Toolbar



The Windows toolbar provides general menu options on the SSIS main screen.

- File - Logon/off, Change Password, Utilities (to work with user settings) and Empty Data Cache
- View - Toolbar, change how items are displayed
- Searches/Logs – lists all Searches/Logs within the application
- Tools - General Reports, access other areas of SSIS (e.g., SSIS Admin)
- Window - view and toggle between open windows
- Help - Social Services Manual

SSIS Application Toolbar



The SSIS Application toolbar is located under the Windows toolbar and displays icons for the most used features in SSIS. User options may differ based on the location within SSIS and security access:

- Log On – log onto SSIS
- Log Off – log off SSIS
- User Activity Log – displays the user’s activity log, ability to search for another user’s activity log
- Reminders and Alerts Log – displays the user’s reminders and alerts
- Service Arrangement Searches – displays Service Arrangement Searches
- Payment Searches – displays Payment Searches
- Person Search – displays Person Search
- Business Organization Search – displays Business Organization Search
- Workgroup Search – displays a user’s caseload and options to search another’s caseload
- Intake Search – displays intake search
- Contents – displays the SSIS Help file

Tree View Toolbar



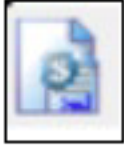
The Tree View toolbar displays when a user selects an option from the Task Panel or a search function from the SSIS Application toolbar. The buttons included on the toolbar are, from left to right:

- Back - moves to the previously selected node
- Forward - enabled only after the Back button is clicked
- Up - moves up one level in the Tree View
- Down – moves down one level in Tree View to the folders/nodes available
- Home – moves to top folder in the Tree View
- Add New – if enabled, creates a new record
- Save (blue disc) – saves entries and edits. This feature is Gray when it’s not available.
- Cancel – cancels the last action
- Print – enabled when print is an Action menu item
- Refresh – refreshes current folder/node on the screen
- Delete – deletes the selected record from an agency’s database
- Remove – removes the selected record
- Options – displays options to change the view of SSIS on the user’s screen
- Action menu – displays the Action menu

Quick Add buttons may be available depending on where the user is in SSIS.

Quick Add Buttons

Quick Add buttons display at the end of the Tree View toolbar based on the user's location and options in SSIS. Use these icons for quick access to add items such as a New Activity, New Service Arrangement, or a New Payment.



- New Service Arrangement – creates a new service arrangement
- Create Duplicate of Service Arrangement – creates a duplicate service arrangement



- New Payment – creates a new payment
- Create Duplicate of Payment – creates a duplicate payment

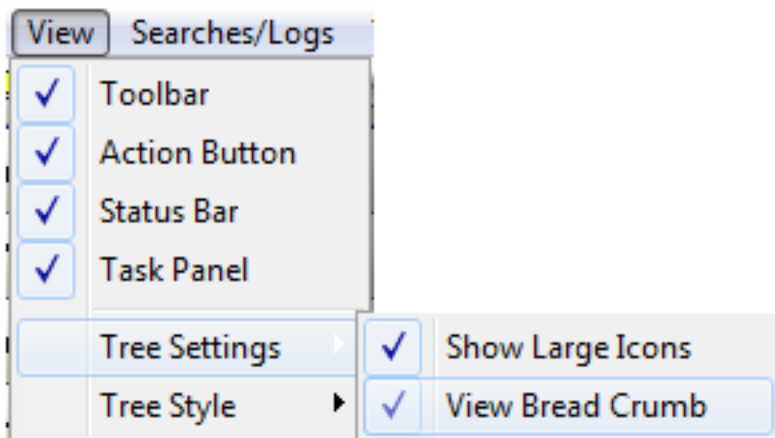
The Action Menu

Breadcrumbs

Breadcrumbs display under the Tree View Toolbar.

As a user goes into further details in a particular area of SSIS a path, called a **Bread Crumb**, is created which can be used to navigate back to previous screens.

- View menu
- Select Tree Settings
- Select View Bread Crumb



Code Toggle

The Code Toggle button is used to switch the display of field from Code – Description to Description – Code and vice versa. It can be found at the end of these fields:

- Program
- Service
- County Sub-service
- HCPCS/Modifier
- Special Cost Code



01 - Initial clothing	
Code	Description
01	Initial clothing
02	Additional clothing
03	Transportation, non-medical
04	Transportation, medical

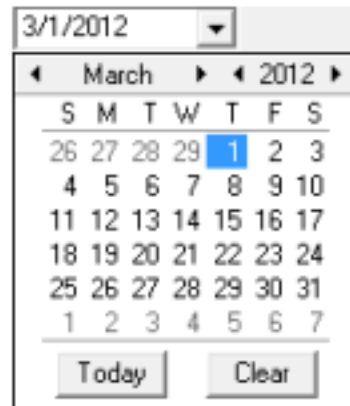
When Code Toggle displays a/#, the code is sorted numerically. The type-ahead feature for this field looks for the number.



Initial clothing - 01	
Code	Description
01	Initial clothing
19	MAPCY adjustment
05	Medical care not paid from MA
99	Miscellaneous, unspecified

When Code Toggle displays #/a, the description is sorted alphabetically. The type-ahead feature for this field looks at the description.

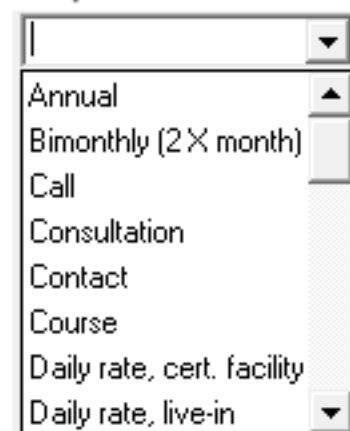
Date Picker



Month



Drop-down Menu



The Date Picker is used throughout SSIS when a date is entered. Users may type in the date, click on the date in the calendar for the date to fill into the date field, or click the Today button to fill in today's date. Selecting Clear returns the user to the date field.

To change the month and year:

- Use the calendar's arrow keys to move backward and forward in time

Or

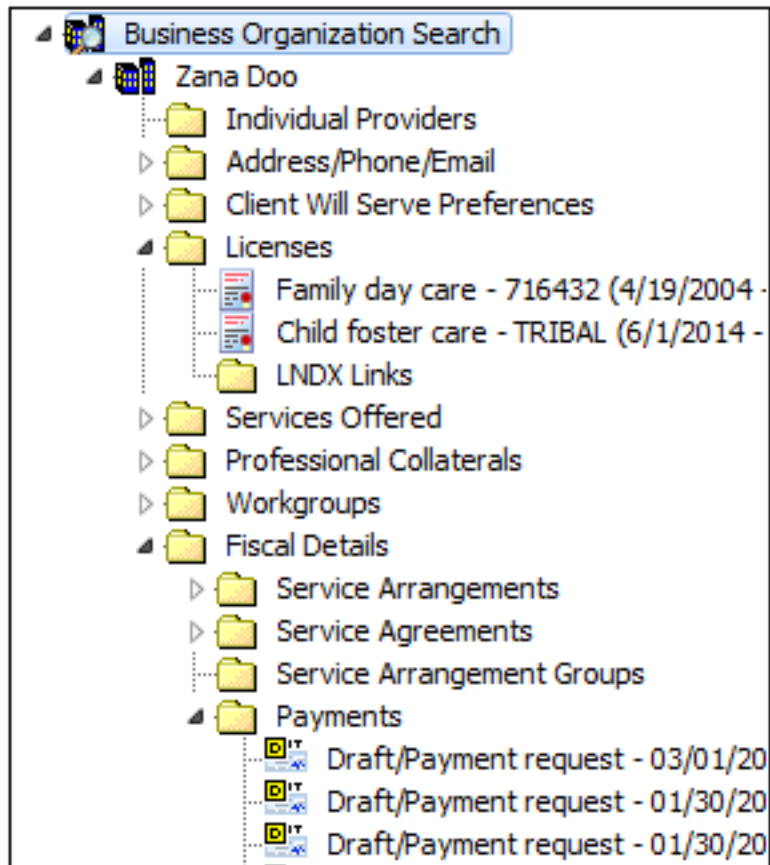
- Click and hold the mouse button on the month on the banner to display a list of previous three and next three months

Pressing the spacebar auto fills today's date when the cursor is in the date field.

Drop-down menus display throughout SSIS for the user to select information from the list. Click on the down arrow to display the selections available.

Only one item can be selected from a drop-down menu, except for advanced searches where the advanced filter is available. See more information regarding advanced searches for details on the advanced filter option.

Folders vs. Nodes

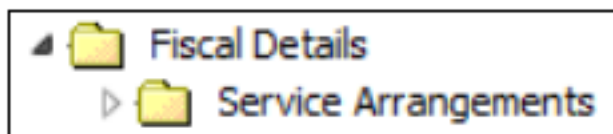


The structure of the SSIS Tree View is based on general Windows functionality. The Tree View is composed of folders and nodes. Each folder/node represents a line in the tree. Indicators display to the left of the folder/node to expand or collapse the folder/node.

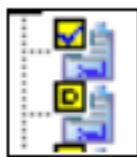
They are further defined as:

- Folders – displayed with a manila folder icon
- Nodes – displayed with an individual icon. These icons vary depending on the function being accessed

Folder



Node



Field Indicators

There are two types of Field Indicators - Required and Warning. Field Indicators provide the user with a visual indication if information in a field is required. As information is entered, the field indicators no longer display. Positioning the mouse over the field indicator displays a flyover that provides more information regarding the indicator.



The Required Field Indicator displays a red oval with a white exclamation point. This marker indicates information must be entered into this field to save the record. As information is entered, additional fields can become mandatory or no longer required.

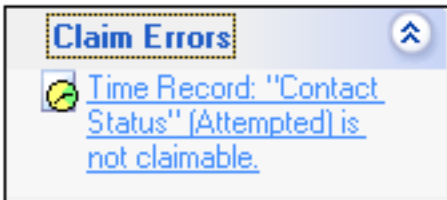


The Warning Field Indicator displays a yellow triangle with an exclamation point. The warning message is informational, alerting a user that it can become required based on the information entered.

Help Text



Help Text, underlined and in blue font color, is used throughout SSIS. Clicking on Help Text displays additional information.



Help Text can be field specific or related to data cleanup and proofing errors.

Radio Button

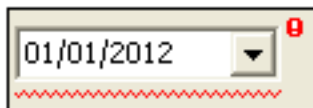


Yes No

Radio buttons display throughout SSIS, allowing the user to select predefined options.

In most instances only one predefined option can be selected.

Red Squiggly Line



01/01/2012

A red squiggly line indicates entered information does not comply with business rules, e.g., a future date cannot be entered. Positioning the mouse over the red squiggly line displays a flyover that provides more information about the business rule.

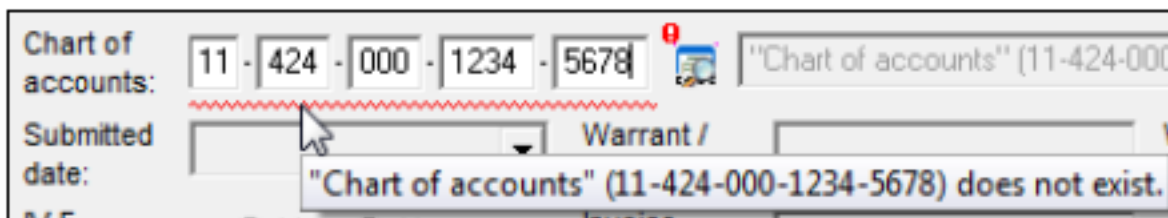


Chart of accounts: 11 - 424 - 000 - 1234 - 5678 "Chart of accounts" (11-424-000-1234-5678) does not exist.

Submitted date: Warrant /

Grid Anatomy

Grids can be edited by clicking on column headers.

- Right clicking on a column header allows the user to access the grid options menu.
- A single left click allows the user to either sort columns or select an item in a grid, then right click to get an action menu for that item.
- Double clicking an item in a grid expands the detail to full screen. To return to the previous view, click the green back arrow.

Users can move, remove, and add columns; print grids; and add footers. To change a grid back to default settings right click on any column heading, select Grid Settings from the Action menu, and select Restore Grid Defaults.